

Appendix D —Checklist for Using PDFs on the Web

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Note: All directions assume you are using Adobe Acrobat 9 Professional.

1. **Determine whether PDF is the appropriate format to use** to post your information on the Web. Reasons to use PDF:
 - the document is longer than 5 pages, or
 - you need to preserve the formatting or layout of the original document (e.g. for printing), or
 - you need to publish a paper document for which no electronic version exists.

2. **If you are creating the PDF yourself, start with a "clean" original document.** Keep the format as simple as you can and use styling built into the word processor. This makes it easier to tag the document for accessibility.
 - Avoid placing graphics, text or tables side by side.
 - Use standard fonts.
 - Use styles, like Heading 1, Heading 2, etc.
 - Use the function for creating bulleted and numbered lists rather than formatting list items manually.
 - Use tabs and columns rather than spaces and tables for laying out your text.
 - Add alt text to graphics.

3. **Create a PDF using Convert to Adobe PDF.** Start with any authoring software (Word, Excel, etc.). If you are creating the PDF from an MS Office application, choose the Acrobat Tab located underneath the header (on the far right of the home tab) choose **Settings** and click the following boxes: Create Bookmarks, Add Links, and Enable Accessibility and Reflow with tagged Adobe PDF. If not available use: **Save as > PDF** (use default settings check box which include, open file after publishing and optimize for online and printing) Add file name and choose location the file should be stored.

(Do not use **File > Print > Adobe PDF** that you used in previous versions of Acrobat unless the Adobe PDF menu is unavailable in your authoring software. You lose the document metadata and do not retain bookmarks if you use this method.)

4. **Create a Document Description.** Search engines use metadata from the Document Description in their search results.
 - Open the Document Description **File > Document Properties** (or Ctrl-D)
 - Select the "Description" tab.
 - follow the guidelines on the EPA metadata site:
<http://yosemite.epa.gov/OEI/webguide.nsf/content/metadatabaqs>

5. **Create Bookmarks.** Select text and use **Ctrl-B** to insert a bookmark. (This method works after the PDF file has been created). To create bookmarks while the conversion to PDF is in progress, choose the Acrobat Tab located underneath the header (on the far right of the home tab) Choose **Preferences > Bookmarks > Convert Work Headings to Bookmarks** then select the OK button

6. **(Optional) Create Web links from URLs in text. Advanced > Document Processing > Create Links from URLs.** Create from URLs in document. Only URLs that begin with http:// will become links.

7. NOTE: EPA does not have a requirement to break large documents into sections. **If you decide to break a large document into sections** follow the requirements at:
<http://yosemite.epa.gov/OEI/webguide.nsf/standards-guidance/pdf-when2>

Accessibility Steps

1. **Tag Your Document:** (NOTE: You can skip this step if you converted your original document as a tagged PDF, e.g. in Word.)
 - If you are creating the PDF from a Microsoft Office application, choose **Adobe PDF > Change Conversion Settings** and select "Enable accessibility and reflow with Tagged PDF". Then select OK. Now create the PDF using **Adobe PDF > Convert to PDF** (or the Convert to PDF icon).
 - If you are using an existing PDF, tag the file for accessibility using Adobe Acrobat (**Advanced > Accessibility > Add Tags to Document**)
2. **Run a Full Check:** (**Advanced > Accessibility > Full Check**), then look at the report it generates and see what you need to fix.
3. **Decide whether to finish making the PDF accessible** or make the content accessible another way.
4. **If you decide not to make the PDF fully accessible,**
 - Provide contact information or
 - Use HTML instead of PDF.
5. **If you will be making the PDF accessible, keep going:**
6. **Check the Reading Order:** Check the reading order and correct what doesn't make sense (**Advanced > Accessibility > Touch Up Reading Order**)
7. **Include Alt Text for Images:** Add alternate text for images (**View > Navigation Tabs > Tags**, select the image that needs alt text, then from the Tag window select **Options > Properties** and fill in the Alternate Text)
8. **Run a Full Check Again:** Repeat step 2 and see what you still need to fix.
9. **Fix any accessibility errors** identified. (see <http://adobe.com/enterprise/accessibility/> for more info)

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